

Employee Death Benefit Report

For deaths after 12-31-91

Telephone (608) 266-2772

1. Name of payor reporting		2. Name of plan	
3. Name of deceased employee or former employee			4. Date of death
5. Address of decedent			
6. Type of payment reported		<input type="checkbox"/> Pension <input type="checkbox"/> Profit sharing <input type="checkbox"/> Annuity	
<input type="checkbox"/> Bonus		<input type="checkbox"/> Death benefit <input type="checkbox"/> Wage Continuation <input type="checkbox"/> Deferred compensation	
<input type="checkbox"/> Other (explain below)			
7. Amount of payment if paid in one sum		Date of payment	
8. If payment will be made by installments, state number and amount of installments, age of beneficiary, mortality table and rate of interest used in determining the value of the installments as of date of death.			

Indicate value as of date of death

9. Names and addresses of beneficiaries	Relationship to decedent	Share of benefits payable

10. THE BENEFITS REPORTED ABOVE ARE PAYABLE UNDER A FEDERALLY ☐ *QUALIFIED* PLAN
☐ *NON-QUALIFIED*

11. If the decedent contributed to the plan or toward the benefits reported on this form, please provide the following:

contributions by decedent \$ _____ contributions by employer to decedent's account \$ _____

CERTIFICATION

As representative of the payor named above, I certify that the information contained in this report is correct to the best of my knowledge and belief.

Signature	Title	Date
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IRA or HR 10 Plan — This form does not have to be completed to report payments from an IRA or HR 10 Plan.

Section 72.34, Wisconsin Statutes provides that every person liable for paying benefits to the estate or a beneficiary of a deceased employee or former employee in the form of an annuity, bonus, pension or other benefit under a retirement, deferred compensation or profit-sharing plan taxable under this chapter, directly or through a trust or fund created by the employer for such purpose, shall give notice of such obligation to the department within 30 days following the date of payment, or the date of the initial payment if more than one payment is forthcoming, to the estate or any beneficiary of such employee or former employee.